DOCUMENT RESUME

ED 162 320 CS 204 486

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TITLE Group Magazine Publishing in the United States: A Descriptive Analysis.
PUB DATE 78
NOTE 15p.; Paper presented at the Annual Meeting of the Association for Education in Journalism (61st, Seattle, Washington, August 13-16, 1978)

EDRS PRICE MF-$0.83 HC-$1.67 Plus Postage.
DESCRIPTORS Information Dissemination; *Journalism; Mass Media; *Media Research; *Periodicals; *Publications; *Publishing Industry
IDENTIFIERS *Ownership

ABSTRACT

The magazine industry has thus far escaped the attention and regulation that both the newspaper and broadcast industries have received. The obvious defense of the magazine industry is the number and diversity of the separate publications of which it is composed. However, recent studies indicate that concentration of magazine ownership is increasing rapidly; today, 102 ownership groups control 480 magazines, with the ten largest groups controling 179 magazines. Seven of the ten are headquartered in New York City, and approximately 70% of all group-owned magazines are headquartered in either New York City or Los Angeles. Almost 68% of the circulation of group-owned magazines is controlled by groups in New York City. By topic, 55 farm magazines account for almost 12% of the group-owned magazines. The top ten of 47 categories account for almost 65% of the magazines. While the magazine industry has not yet experienced the concentration of ownership exhibited by the newspaper industry, the inclination toward such concentration is clear and may exert enormous influence on the industry in the future. (TJ)

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GROUP MAGAZINE PUBLISHING IN THE UNITED STATES: A Descriptive Analysis

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

A Paper Presented to
the Magazine Division
of the Association for Education in Journalism
1978

CS 204 484

Trends toward increased concentration of ownership of newspapers[1] and broadcast stations[2] have attracted considerable research attention and public debate.

Central to the controversy is the belief that concentration of media ownership threatens the basic premise of the press system of the United States. The premise holds that truth emerges from the confluence of many voices speaking in a free "marketplace of ideas."[3] The locus of the threat is pointed up when concentration of ownership withholds some number of voices from the marketplace. It is believed that a diversity of voices is an essential precondition for the libertarian theory to operate effectively. Such concerns have led to strict control of ownership in the broadcast industry[4] and limited control and great debate in the newspaper industry.[5] The controversy over the seriousness of the threat and the appropriate actions for its removal continues to rage.

In the midst of this open debate and political turmoil that has had direct impacts on broadcasting and newspapers, the magazine industry rests serenely, apparently oblivious to the battles around it. Its obvious defense against accusations of the sort lodged against newspapers and broadcasting is the number of separate publications of which it is composed and their apparent diversity. The ownership issue, believed to be a critical one with respect to newspapers and broadcasting, is seen as unimportant

and not applicable to the magazine industry.

Yet, the magazine industry, with its large numbers of publications that address literally thousands of interests, is dominated by the so-called "giants" that control huge blocks of circulation. Peterson, Jensen and Rivers described these magazine empires pointing out that within the magazine industry there exists the equivalents of newspaper groups, cross-media ownership and conglomerate ownership.[6] They also note that the trend toward concentration of ownership in the magazine industry appears to be accellerating.

Little attention has been paid to the nature of ownership concentrations in the magazine industry. Perhaps it is true at this time that such concentrations pose no threat to such an open and diverse industry, but this condition may not hold in the future. Sociological and economic conditions may change such that the magazine industry is enveloped in the "dying voices" controversy.

The purpose of this study is to describe quantitatively the scope and characteristics of the concentrations of ownership in the magazine industry. The study describes the characteristics of so-called magazine publishing groups and their collective share of the magazine publishing industry. A magazine group, for purposes here, is a magazine publishing company that publishes two or more magazines that are issued at least quarterly, are of the general interest or farm publication type and are generally circulated in the

United States.

A list of magazine groups was developed from the January, 1978 edition of the Standard Rate and Data Service General Consumer and Farm Publication directory.[7] For each magazine information was gathered from SRDS and Ayers Directory[8] on its group membership, circulation, SRDS category type, geographic location of its publication headquarters and whether it was ranked in the 110 highest circulation magazines in the United States in the Audit Bureau of Circulation listing published in the World Almanac and Book of Facts-1978.[9] Frequency analysis of variable combinations was the principle computational technique.

The research question is:

What is the scope and what are the characteristics of group-owned magazine publishing in the United States?

The data revealed that there are 102 magazine ownership groups in the United States. This figure was reduced from 107 groups when magazines with one domestic and a single foreign language or international edition of the same magazine were withdrawn.

The 102 groups each own and operate at least two magazines, published at least quarterly within the United States. The total number of group-owned magazines is 480. As indicated in Table 1 which reveals the number of groups that own certain numbers of magazines, most of the groups own only two or three magazines while 10 groups own 10

TABLE 1

Number of Magazines Owned by Groups

Groups	No. Magazines Each
1	36
1	24
1	21
1	19
1	18
1	16
2	12
1	11
1	10
1	9
4	8
3	7
2	6
6	5
12	4
21	3
43	2
102	480

or more. The average number of magazines owned by each group is 4.71.

As shown in Table 2 the 10 largest magazine groups by number of magazines owned, control 179 magazines which

TABLE 2

Top 10 Magazine Ownership Groups by Number of Magazines Owned

Rank	Group Name	HQ Location	No. Mags	% Group Mags
1.	CBS Inc.	New York	36	7.50
2.	Ziff-Davis Pub.	New York	24	5.00
3.	Davis Pubs, Inc.	New York	21	4.38
4.	Conde Nast Pub.	New York	19	3.96
5.	Meredith Pub. Co.	Des Moines	18	3.75
6.	Hearst Corp.	New York	16	3.33
7.	Ideal Pub.	New York	12	2.50
8.	Webb Co.	St. Paul	12	2.50
9.	Times Mirror	New York	11	2.29
10.	Challenge Pub.	Canoga Park, Calif.	10	2.08
			179	37.29

is 37.29% of all of the group-owned magazines. The largest group, CBS Inc. owns 36 magazines which is 7.5% of the total of all group-owned publications. Seven of the top 10 groups with respect to number of magazines owned are headquartered in New York City. Among the top 10 groups by number of magazines owned the average number owned is 17.9.

The 480 magazines which are controlled by 102 groups account for 220,585,584 circulation which is 8.82% of total magazine circulation in the United States of an estimated 2.5 billion.[10]

The average circulation for the group-owned magazines is 459,533.31 with circulations ranging from 2,279 to 13,403,622.* The median circulation is 149,999.94 for all group-owned magazines.

Table 3 lists the top 10 magazine ownership groups with respect to circulation. CBS Inc. leads the list in

TABLE 3

Top 10 Magazine Ownership Groups by Circulation

Rank	Group Name	HQ Location	Circulation	No. Mags
1.	CBS Inc.	New York	26,320,248	36
2.	Meredith Corp.	Des Moines	16,844,958	18
3.	Cadence Ind. Inc.	Caldwell, NJ	14,153,622	3
4.	Hearst Corp.	New York	13,919,664	15
5.	NY Times Co.	New York	13,550,880	8
6.	Time, Inc.	New York	11,170,062	6
7.	Ziff-Davis Pub.	New York	7,589,568	24
8.	Downe Comm.	New York	6,942,546	3
9.	McCalls Pub.	New York	6,752,026	2
10.	Times Mirror	New York	6,676,945	2
			123,920,519	127

*Marvel Comics were included in the tabulations because they were listed as magazines by SRDS and otherwise met inclusion criteria.

circulation as it did in the number of magazines owned. The top 10 circulation groups control 123,920,519 circulation units. They own 127 magazines. Their combined circulation accounts for 56% of the total of group-owned circulation and 4.95% of total magazine circulation. Six groups control over 10 million circulation each. Thirty-five groups control over one million circulation each. Twenty-two groups have from 1-5 million circulation each, seven groups have from 6-10 million circulation each and six groups have 11 or more million circulation each.

Eight of the 10 top magazine ownership groups by circulation are headquartered in New York City.

As shown in Table 4 the top 10 subject or topical categories by number of magazines is led by the farm magazine category with 55 publications that equals 11.46% of all group-owned magazines. This is followed by home service and home

TABLE 4

Top 10 Magazine Type Categories

Rank	Magazine Type	No. Mags	%Group Mags
1.	Farm	55	11.46
2.	Home Service, Home	49	10.21
3.	Automotive	31	6.46
4.	Crafts, Hobbies, Models	30	6.25
5.	Sports	29	6.04
6.	Women's	28	5.83
7.	Fishing-Hunting	25	5.21
8.	Radio-Television	18	3.75
9.	Music	16	3.33
9.	Motorcycle	16	3.33
10.	Gardening	13	2.71
		310	64.58

categories that list 49 magazines or 10.21% of the group-owned publications. The top 10 subject categories account for 310 of the 480 magazines or 64.58% of all of the group-owned magazines. Type classifications were adopted directly from those used by SRDS.

The 480 group-owned magazines encompassed 47 topical categories with 30 categories representing at least 1,000,000

TABLE 5

Magazine Types by Circulation*

Rank	Type	No. Mags	Circulation	% Grp. Circ.
1.	Women's	28	53,007,833	24.03
2.	Home Service, Home	49	27,698,367	12.55
3.	Comics	2	15,842,155	7.18
4.	News	5	10,372,730	4.70
5.	Men's	7	9,642,208	4.37
6.	Youth	7	8,181,485	3.70
7.	Fishing, Hunting	25	7,820,358	3.54
8.	Dressmaking	11	7,174,894	3.25
9.	Crafts, Hobbies	30	6,839,166	3.10
10.	General Editorial	9	6,537,677	2.96
11.	Sports	29	6,117,236	2.77
12.	Automotive	31	5,988,401	2.71
13.	Gardening	13	5,979,923	2.70
14.	Mechanics, Science	6	5,518,370	2.50
15.	Farm, Ranch, Agri.	55	4,229,604	1.91
16.	Business, Finance	7	3,451,185	1.56
17.	Almanacs, Directories	2	3,093,396	1.40
18.	Movie, R/TV People	10	3,078,581	1.39
19.	Health	4	2,616,465	1.18
20.	Camp, Outdoor Rec.	6	2,411,256	1.09
21.	Romance	6	2,220,236	1.00
22.	Photography	9	2,205,586	.99
23.	Music	16	2,163,283	.98
24.	Radio/Television	18	2,088,699	.94
25.	Children's	2	1,911,310	.86
26.	Motorcycle	16	1,878 522	.85
27.	Women's Fashion	4	1,400,000	.63
28.	Campers, RV, Mob. Home	8	1,284,783	.58
29.	Fraternal Org.	2	1,127,000	.51
30.	Senior Citizens	5	1,125,246	.51
		422	213,005,955	96.5%

* Only types with at least 1,000,000 circulation were included in the table.

circulation each. The highest circulation category was Women's magazines that accounted for 24.03% of the group-owned circulation. The top 30 topical categories included 422 magazines that represent 213,005,955 circulation or 96.5% of all group-owned magazine circulation.

The locations of magazine group headquarters are heavily concentrated in the Middle Atlantic region which includes New York City. As shown in Table 6 the Pacific region, which includes Los Angeles, California, is second in concentration. The region with the fewest number of group headquarters is the West South Central (Arkansas, Louisiana, Oklahoma and Texas) region with two headquarters. The concentrations in the New York City and Los Angeles areas account for almost 70% of all of the group-owned magazines.

TABLE 6

Number of Group-Owned Magazines by Regions*

Rank	Region	No. Mags	% Total
1.	Middle Atlantic	238	49.6
2.	Pacific	96	20.0
3.	East North Central	51	10.6
4.	West North Central	40	8.3
5.	New England	23	4.8
6.	East South Central	11	2.3
7.	Mountain	10	2.1
8.	South Atlantic	9	1.9
9.	West South Central	2	.4
		480	100.0

* See Note 11 for description of regions.

Circulation of group-owned magazines by regional location of their headquarters is shown in Table 7. This table reveals the amounts of circulation controlled by magazine groups whose headquarters are located in the nine geographic regions. It does not relate to the physical distribution or actual circulation of magazines across the nation.

TABLE 7

Circulation of Group-Owned Magazines by Regions*

Rank	Region	Circulation	% Total
1.	Middle Atlantic	149,256,351	67.68
2.	West North Central	24,451,454	11.08
3.	Pacific	18,190,235	8.25
4.	East North Central	14,238,316	6.45
5.	New England	9,585,350	4.34
6.	East South Central	3,640,739	1.65
7.	South Atlantic	819,640	.37
8.	Mountain	311,399	.14
9.	West South Central	92,100	.04
		220,585,584	100.00

*See Note 11 for description of regions.

As in the case of numbers of magazines, when concentrations of control of circulation are explored the Middle Atlantic region (New York City) stands out as the headquarters location with 67.68% of all group-owned circulation headquartered there. The Pacific region drops to third place with 8.25% of the circulation behind the West North Central region with 11.08% of the circulation control. The West South Central region is the weakest in headquarters location with only .04% of the group controlled circulation.

Of the 480 group-owned magazines 48 are listed among the 110 largest circulation magazines in the United States. Some 23 groups have one or more magazines in the top 110 circulation rankings. Group-owned magazines are found to hold the positions of 4th, 5th, 6th, 7th, 9th and 11th among the nation's largest circulation magazines.

These descriptions of the scope and characteristics of group-owned magazine publishing in the United States reveal that a large and powerful segment of the magazine industry is highly concentrated in its ownership patterns. Despite the diversity and multiplicity of magazines that compose the magazine industry it is evident that "giants" have indeed emerged. The effects of these concentrations of ownership lie beyond the scope of this study but clearly a pattern of centralized control can be discerned that pose questions for future research and philosophical attention.

It has been shown that 102 magazine ownership groups control 480 magazines that in turn control a total of 220,585,584 circulation. It has been shown that the top 10 groups control 179 magazines and 123,920,519 circulation. The topical categories encompassed by the group-owned magazines is indeed diverse, yet the top 30 category types account for over 213 million circulation.

An especially interesting and potentially threatening finding has revealed that 67.68% of the group-owned magazine circulation is headquartered in the New York area. Johnstone, Salwski and Bowman found similar concentrations in the newspaper industry:

> ... it is clear that the first prominent feature of journalistic manpower is its concentration both in numbers and in influence in the Northeast, and more specifically in New York City.[12]

So the trend in newspaper concentrations seems to be trailed by distinctly similar concentration patterns in the magazine industry.

It is also notable that 48 of the group-owned magazines are found among the lists of the 110 largest circulation magazines in the United States.

The characteristics of the concentrations in ownership in the magazine industry that have been discussed here suggest that the potential for dysfunctional effects is a problem worthy of further attention. The magazine industry clearly has not experienced the concentrations exhibited by the newspaper industry but the inclination toward such concentration is clear. This inclination bears watching, for it may exert enormous influence on the magazine industry in the future.

FOOTNOTES

1. Editor & Publisher, February 23, 1974, p. 9.; Bryce Rucker, The First Freedom (Carbondale, Ill.: Southern Illinois University Press, 1968), pp.21-23.; Editor & Publisher International Yearbook, 1977.

2. Richard L. Worsnop, "Competing Media," Editorial Research Reports, July 18, 1969, pp.538-39.; Editor & Publisher International Yearbook,1973, pp.A91-A98.; Federal Communications Commission Annual Report, Fiscal 1972, pp.243-44.

3. Oliver Wendell Holmes, Abrams v. United States, 250 U.S. 616, 630 (1919); Fredrick Siebert, Theodore Peterson, and Wilbur Schramm, Four Theories of the Press (Urbana: University of Illinois Press, 1956).

4. Peter M. Sandman, David M. Rubin, and David B. Sachsman, Media: An Introductory Analysis of American Mass Communications, 2d. ed.,(Englewood Cliffs, N.J.: Prentice-Hall, Inc.,1976), pp. 110-124, 190-194. I. William Hill, "FCC Bars Cross-Ownership, Breaks Up Media in 16 Cities," Editor & Publisher, February 1, 1975, p. 9.

5. Sandman, Rubin, Sachsman, op. cit., pp. 187-188; Lenora Williamson, "Syndicate Exclusivity Policy on Trial in Anti-Trust Case," Editor & Publisher, February 1, 1975, p. 14.

6. Theodore Peterson, Jay W. Jensen, and William L. Rivers, The Mass Media and Modern Society, (New York: Holt, Rinehart and Winston, Inc., 1965)pp. 68-71.

7. Standard Rate and Data Service, Consumer Magazine and Farm Publication Rates and Data, January 27, 1978, pp. 606-608.

8. Ayers Directory of Newspapers and Magazines (Philadelphia: Ayer Press Inc., 1977.

9. The World Almanac and Book of Facts, 1978, (New York: Newspaper Enterprise Assn., Inc., 1978) p. 429.

10. David G. Clark and William B. Blankenburg, You & Media (San Francisco: Canfield Press, 1973) p. 23.

11. Standard .S. Census Divisions, published inside back cover all Standard Rate and Data Service editions.

New England

Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont.

Middle Atlantic

New Jersey, New York, Pennsylvania.

East North Central

Illinois, Indiana, Michigan, Ohio, Wisconsin.

West North Central

Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota.

South Atlantic

Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina Virginia, West Virginia.

East South Central

Alabama, Kentucky, Mississippi, Tennessee.

West South Central

Arkansas, Louisiana, Oklahoma, Texas.

Mountain

Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming.

Pacific

Alaska, California, Hawaii, Oregon, Washington.

12. John W.C. Johnstone, Edward J. Salwski and William W. Mowman The News People: A Sociological Portrait of American Journalists and Their Work(Urbana: University of Illinois Press, 1976) p. 21.